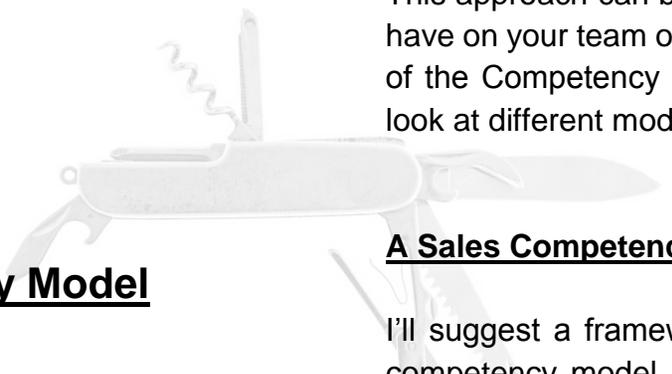


Sales Manager Survival Guide

Sales Competency Model



Sales Competency Model

Several times in this book, I referred to a Sales Competency Model. Basically, this model is a tool you can leverage to develop a “picture” of an ideal sales person---that is the ideal characteristics of an individual for a specific role, or for a person at a certain point in her development in that role.

It’s a tool you can use to help recruit the right people, to make sure they have developed the right skills and capabilities at the conclusion of their on-boarding. Its utility doesn’t stop there. It can be used to help in the development of your people.

For example, what skills, capabilities, behaviors and attitudes would you expect after a year in the role? What about a senior person? Perhaps even, what skills, capabilities, and attitudes would you expect of a manager, or a sales specialist?

This approach can be used for every key role you might have on your team or in your organization. The specifics of the Competency Model will vary, so it’s important to look at different models for each key role.

A Sales Competency Framework:

I’ll suggest a framework for developing your first sales competency model. You may have different ideas, so feel free to adopt the approach to best fit your needs and business.

The framework, we’ll use as a starting point is for a sales person in a B2B complex selling organization. Even if what you are trying to describe fits in this context, undoubtedly, there are things missing or things that are irrelevant.

If you are in a B2C environment, there may be some common elements, for example industry or market

knowledge, or basic selling skills. But there will be some big differences.

Likewise, some roles may be so different that you may want to develop completely different models—though test that thought a little before you start proliferating models. You'll understand a little more as we dive into building this framework or model.

Step 1: The framework starts with identifying the major categories that characterize the ideal sales person for your organization. Most of these, in fact, will be common across many different types of organizations.

I've categorized 10 major areas that contribute to sales success. Too often, managers take far too narrow a view of competencies needed. For example, some look only for sales skills. Others may look at market/industry knowledge and sales skills. I think it's critical to look at the competencies in a much richer way.

1. **Behaviors and Attitudes**
2. **Industry and Market Knowledge**
3. **Customer Intimacy and Knowledge**
4. **Understanding of Your Own Products and Solutions**
5. **Understanding of How to Get Things Done Within the Company**
6. **General Business Knowledge**
7. **Ability to Provide Insights to Customers**

8. **Value Creation, Communication, and Delivery**

9. **Sales Process, Planning, and Execution**

10. **General Selling Skills**

You may want to combine some of these categories, you may see some that are missing.

Step 2: The next thing you want to do with each category is drill down and describe specific characteristics, skills, experiences, attitudes, behaviors that are important for the role.

For example, within *the Behaviors and Attitudes Category*, you may want to consider things like:

- **Time focused**
- **Growth oriented mindset**
- **Professional appearance, conduct, demeanor**
- **Follow through/ability to complete things**
- **Takes responsibility, personal accountability**
- **Curiosity**
- **Team orientation**
- **Listening skills**
- **Comfort in talking about money**
- **Able to deal with conflict and confrontation**
- **Strong ethical foundation, trustworthy**
- **Attitude to continuous learning**
- **Driven to be successful**
- **Engaging**
- **Able to get commitments**

- **Delivers on commitments made**
- **Able to deal with rejection**
- **Ability to navigate organizations**
- **Critical Thinking, Problem solving skills**
- **Passion, energy enthusiasm**
- **Can do, get it done**
- **Technical aptitude, comfort with technology discussions**
- **Cognitive capability**
- **Problem solving orientation**
- **Interested in other people and their success**
- **Strong self-confidence and self-image**
- **Requires minimal management supervision. Requires minimal direction**
- **Comfortable with ambiguity.**
- **Coachable and value coaching**
- **Driven to accomplishment, success oriented**
- **Focused on own self-improvement and development**
- **Relentless communicator**
- **Detail oriented**
- **Self-driven**
- **Out of the box thinker**
- **Gives and receives feedback**

Some of these are redundant and you may want to winnow the list. Again, there may be some that are important to you that I've not included.

I've provided just a few words describing each characteristic, but it's actually more useful *if you* write a full sentence describing the characteristics. For example, what do we mean by "time focused?" A sentence clarifies this.

As you put these together, for each category, think about what you see in your best performers. For example, what behaviors and attitudes do they exhibit, what's their industry and market knowledge, and so forth?

For your first pass, brainstorm, and go for volume. For example, set an arbitrary goal of identifying 30 characteristics in each category. After you have completed all the categories, you can go back and prioritize and narrow things down.

Having said that, I tend to prefer pretty comprehensive lists.

Step 3: Once you've identified all the categories and competencies within each category, you are going to want to look at how they apply to each role or how they apply to the development of a person in a role.

Below, you'll see some examples. I've only used a couple of major categories and a few competencies as examples. Naturally, you would want to put every category and the competencies within each category on this list.

Example 1: Different Sales Roles

<u>Category</u>	<u>Competency</u>	<u>Sales Develop- ment Rep (SDR)</u>	<u>Inside Sales</u>	<u>Sales Person</u>	<u>Account Manager</u>	<u>Sales Specialist</u>
Behaviors and Attitudes						
	Able to get appropriate commitments from customers and team mates.	2	4	4	5	3
	Strong technical aptitude and ability to translate in terms meaningful to customers.	2	3	3	4	5
Sales Process, Planning, Execution						
	Maintains a calendar, blocking and scheduling time to maximize productivity and effectiveness.	3	5	5	5	5
	Understands the customer buying process and can align and execute the sales process in tandem with the customer buying process	2	3	4	5	4
	Maintains an accurate pipeline and funnel with high integrity.	1	3	4	5	3

Example 2: Development Within A Role

<u>Category</u>	<u>Competency</u>	<u>Recruiting</u>	<u>After Onboarding</u>	<u>After 1 year</u>	<u>Senior Level</u>	<u>Manager</u>
Behaviors and Attitudes						
	Able to get appropriate commitments from customers and team mates	4	4	5	5	5
	Strong technical aptitude and ability to translate in terms meaningful to customers.	2	3	3	4	4
Sales Process, Planning, Execution						
	Maintains a calendar, blocking and scheduling time to maximize productivity and effectiveness.	3	4	5	5	5
	Understands the customer buying process and can align and execute the sales process in tandem with the customer buying process	N/A	3	4	5	5
	Maintains an accurate pipeline and funnel with high integrity.	N/A	3	4	5	5

You'll notice I've created a ratings scale, applying a rating to each competency. In this case, I've used a 1-5 scale with 5 being "High."

When you develop your scale, you will want to make sure you've identified what each means. For example: 1: Basic capabilities or 5: Able to teach/coach/mentor others in this competency.

As you start to fill out these matrices, you now start developing a more complete picture of what the "ideal" person looks like in each role or as they progress through their careers.

How Do You Use This?

I'm sure you can start to see lots of applications for this. First in recruiting, now that you've developed a rich profile of the ideal competencies and characteristics for the role, as well as the level or competency and capability the candidate should have, you have a clear method of evaluating candidates based on how they rate or fit.

You can use this in developing their onboarding plan to make sure they get to the skill level needed to perform on the job.

You can leverage this in developing the skills and capabilities of each person, growing their ability to contribute and preparing them to step into higher levels of responsibility.

Likewise, you may have various sales roles on your team. You may have SDR's, Inside Sales, Sales People, Account Managers. This framework helps you identify the skill level needed for success in each role.

Some Cautions!

First: Take the time to develop a very comprehensive model for your people. If you don't know what "ideal" looks like, how can you coach and develop your people appropriately. When I say "comprehensive," I mean make sure it's complete. It does you no good to focus just on the top two or three in each category. I've seen some models having well over 100 competencies.

Being a sales person requires a huge number of skills, capabilities, and experiences. It requires certain behaviors and attitudes. Take the time to develop a strong model.

I'd start with one model that covers the various roles in your organization, like the one in Example 1. After you get comfortable with that, I'd apply the same model to your Recruiting Criteria. Over time, I'd expand it to cover all the areas in Example 2.

Second: Don't manage to the "boxes." Too many efforts in developing sales competency models are derailed by people trying to manage to each box or element of the competency model. It's not only impossible, but it just doesn't make sense. No individual will ever meet your "perfect" picture

across all elements. The Model provides a framework for moving people to that goal—and it will change, based on where they are in their job and careers.

Think of this as providing general guidelines. You want to meet as many as you can. Some are critical, “must haves.” Be sure to identify those.

Third: Use it! Too often, we look at sales skills, behaviors, and competencies and rely on past experience or gut instinct. While these are important, they can’t provide a basis for disciplined, consistent, and systematic development of individuals or a team. Our worlds are too complex to be managing by instinct or intuition. We need processes and tools to help us and to enable us to continually improve. That’s our goal with this tool.

Fourth: Keep updating it! The extraordinary skills of today become table stakes tomorrow. Take a good look at the framework at least once a year. Think of what’s working, what’s not. Think about what’s changed or different--both within your company, but more importantly in competing and creating value for the customer.

An outdated/obsolete set of criteria can be very damaging!

Final Thoughts:

You will find great ways to leverage this framework as you read this book and as you coach and develop your people.

This is one of the single most powerful tools a sales manager can have. Take the time to develop something that’s helpful to you and use it!

About Sales Manager Survival Guide:

These materials are supplementary materials provided to purchasers of the Sales Manager Survival Guide. For more information and resources, visit salesmanagersurvivalguide.com

About Dave Brock:

Dave is the author of Sales Manager Survival Guide and is CEO of Partners In EXCELLENCE, a global business strategy, sales, marketing, and customer experience consulting company.

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Sample Sales Competency Framework

	Skill or Capability	Priority	Sales Role				Notes
			Recruiting	After Onboarding	One Year	Senior Level	
Behaviors and Attitudes	Time focused						
	Professional appearance, conduct, demeanor						
	Strong follow through						
	Takes responsibility, personal accountability						
	Curiosity						
	Strong self confidence						
	Team oriented						
	Strong listening skills						
	Comfortable talking about money						
	Able to deal with conflict and confrontation						
	Strong ethical foundation, trustworthy						
	Attitude to continuous learning						
	Driven to be successful						
	Engaging						
	Able to get commitments						
	Delivers on commitments made						
	Able to deal with rejection						
Ability to navigate organizations							
Critical Thinking, Problem solving skills							
Passion, energy enthusiasm							

Can do, get it done							
Technical aptitude, comfort with technology discussions							
Cognitive capability							
Problem solving orientation							
Interested in other people and their success							
Strong self -confidence and self-image							
Requires minimal management supervision. Requires minimal direction							
Comfortable with ambiguity.							
Coachable and value coaching							
Driven to accomplishment, success oriented							
Focused on own self- improvement and development							
Relentless communicator							
Detail oriented							
Self-driven							
Out of the box thinker							

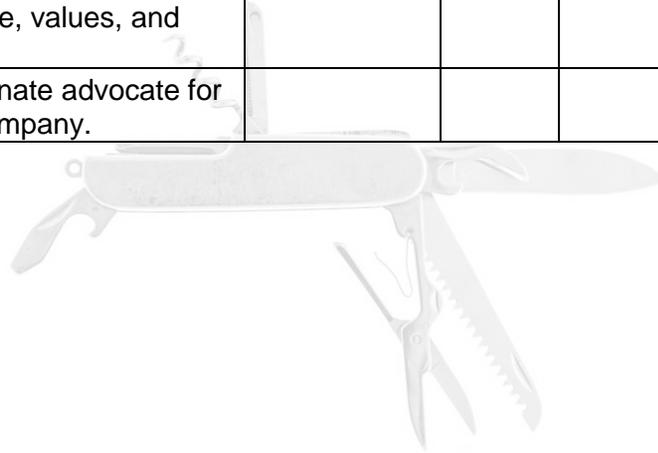
	Skill or Capability	Priority	Sales Role			Senior Level	Notes
			Recruiting	After Onboarding	One Year		
Industry and Market Knowledge	Knowledge of key trends, threats and opportunities in the industry/market						
	Knowledge of key processes, structures, issues, metrics, etc. within target industries						
	Knowledge of markets, market structure, market drivers						
	Knowledge of major players in the market and their relative positioning						
	Knowledge of terminology and jargon in the industry/market.						
	Knowledge of competitors, business strategies, positioning, performance, priorities.						
	Able to comfortably, confidently, and credibly talk to people in the industry about issues relevant to their industries and markets.						

	Skill or Capability	Priority	Sales Role				Notes
			Recruiting	After Onboarding	One Year	Senior Level	
Customer Intimacy And Knowledge	Knowledge of customer business strategies, their competition, their customers, their positioning, performance, priorities.						
	Knowledge of customer organizational structure and the interrelationships in functions.						
	Understand key customer financial, operational, and performance metrics and goals						
	Aggressively expands relationships in accounts						
	Understands customer political structure.						
	Can navigate customer organizations with agility and confidence, developing value based relationships across the organization						
	Understands how customer makes buying and investment decisions						
	Understands the culture and value systems of the customer and can align behaviors and actions with these.						
	Able to comfortably, confidently, and credibly talk to people in company about issues relevant to achieving their growth goals.						
Confident in presenting new ideas and opportunities and the value they create to the appropriate levels in the customer.							

	Skill or Capability	Sales Role				Notes
		Recruiting	After Onboarding	One Year	Senior Level	
Understanding Of Own Products And Solutions	Has a deep understanding of all products and solutions.					
	Can effectively communicate and demonstrate the capabilities of the products and services to customers.					
	Able to identify and communicate the value the products and solutions can create for customers.					
	Understands and can implement/execute company Go To Market strategies.					
	Can easily map the products and solutions into how customers leverage these to solve problems.					
	Has deep understanding of competitive solutions and company differentiators.					
	Has deep belief and passion in selling company solutions. Excited about company solutions/products and the value they bring to customers.					

	Skill or Capability	Priority	Sales Role				Notes
			Recruiting	After Onboarding	One Year	Senior Level	
Getting Things Done Within Own Company	Deep understanding of company strategies, priorities, and positioning						
	Deep understanding of organizational roles and responsibilities.						
	Knowledge and ability to execute using the company project management processes						
	Understands company product development and introduction processes and strategies.						
	Understands and actively leverages company customer service and problem management processes to serve customers.						
	Understands order entry, contract management, and related processes and can leverage these in accelerating sales with customers.						
	Understands company quality management processes and how they impact and serve customers.						
	Understands and leverages company marketing programs to grow territory and relationships.						
	Understands and exploits all tools and systems provided by the company to improve personal productivity						

	Is respected by peers and others within the company.						
	Others in the company actively seek the opinions and view of the person.						
	Nimble in navigating the company to get things done.						
	Minimizes breakage in getting things done within the company						
	Understands and is a role model in leveraging company culture, values, and beliefs.						
	Is an articulate and passionate advocate for the customer within the company.						



	Skill or Capability	Priority	Sales Role				Notes
			Recruiting	After Onboarding	One Year	Senior Level	
General Business Knowledge	Understands different structures of business and how organizations and business work.						
	Understands the strategic planning, prioritization and goal setting processes.						
	Understand the missions and roles of the various functional departments that may exist within organizations, their missions/goals, and how they interrelate.						
	Can analyze and leverage financial and other business data to understand company performance.						
	Can leverage financial and other performance analysis to identify potential opportunities and problems within an organization.						
	Is agile in financial selling.						
	Understands the ecosystems of how businesses work and relate to each other, understand total value chain from supplier through company through customer through end consumer.						
	Is conversant and credible in discussing a wide range of general business issues and trends.						
	Understands key issues and trends in supply chain management and procurement.						

	Skill or Capability	Priority	Sales Role				Notes
			Recruiting	After Onboarding	One Year	Senior Level	
Ability To Provide Insights To The Customer	Able to bring new insights to customers, getting them to think about their business and approaches differently.						
	Able to identify new opportunities to grow, reduce cost, improve profitability, improve operational efficiency, improve their ability to serve customers.						
	Able to translate trends and issues in the customer's markets and with their customers into opportunities for the customer to exploit using the sales person's solutions.						
	Can think about the problem the customer is trying to solve, develop, and present strategies/solutions to help the customer solve the problem.						
	Able to engage the customer (at all levels) in thoughtful, informed, and credible discussions about their business, strategies, markets, opportunities.						
	Able to build relationships and "earn the right" to challenge customers and get them to think about their businesses differently.						
	Able to lead collaborative problem solving, opportunity identification discussions with the customer.						

	Skill or Capability	Priority	Sales Role				Notes
			Recruiting	After Onboarding	One Year	Senior Level	
Value Creation, Communication And Delivery	Understand how to determine what each customer values both from business and personal points of view.						
	Able to connect and communicate the value of the products and solutions in terms specific to what each person in the customer values.						
	Able to directly tie value to customer (org and individual) goals, metrics, and priorities						
	Able to quantify value in terms relevant to the customer (financial selling)						
	Creates value in every interaction with the customer.						
	Able to create "value in the process," getting the customer to recognize the value created."						
	Can get customers to actively engage them in thinking about their business because they know the value the sales person can create.						
	Ability to defend value and not sell price.						
	Able to differentiate and demonstrate superior value to competition and alternatives.						

	Skill or Capability	Priority	Sales Role				Notes
			Recruiting	After Onboarding	One Year	Senior Level	
Sales Process, Planning, and Execution	Maintains a calendar, blocking and scheduling time to maximize productivity and effectiveness.						
	Proactive, maintaining a balance between short and long term objectives and view of time.						
	Low propensity to be reactive in time management and commitments						
	Vicious time management/prioritization						
	Understands the customer buying process and can align and execute the sales process in tandem with the customer buying process						
	Actively leverages sales process to increase win rate, decrease sales cycle, and improve deal profitability.						
	Understands and leverages the sales process in every opportunity.						
	Vicious focus in disqualifying opportunities outside the sweet spot defined in the sales process.						
	Understands and actively leverages documented deal strategies in managing opportunities. Keeps strategies and next steps updated.						

Proactively plans and documents key sales calls, leveraging sales process and deal strategy to plan and execute high impact calls.						
Maintains an accurate pipeline and funnel with high integrity.						
Scrubs pipeline of bad deals and inactive opportunities.						
Understands and maintains pipeline metrics, maximizing win rates, deal flow, deal profitability.						
Maintains, documents, updates and executes account plans for all key accounts.						
Maintains, documents, updates and executes territory plan.						
Consistently invests time in planning both for the short and long term						
Develops and maintains a strong prospecting plan to maximize penetration and growth within both the territory and account. Has strong metrics in place to assure the proper amount of prospecting is done.						
Approaches every aspect of the job with an "end in mind" orientation, working backwards to achieve goals.						
Has a documented plan to build, nurture, and grow solid relationships both in the customers and within Company						
Has a documented plan for own personal development, growth, and continuous learning						
Maintains a set of personal goals and metrics, tracking progress against those.						

	Uses these metrics as a diagnostic for personal performance improvement.						
	Committed to continuous performance improvement and sales excellence.						
	Systematic, disciplined, and process focused in all aspects of job performance.						
	Understands change management and leverages change management skills in facilitating customer buying process.						
	Understands project management and leverages project management approach in helping customers develop and execute their own buying process.						
	Fact based in developing and executing all plans and strategies. Minimizes wishful thinking.						
	Minimizes “react” orientations, always looking several steps ahead. Develops responses focused on overall objective.						

	Skill or Capability	Priority	Sales Role				Notes
			Recruiting	After Onboarding	One Year	Senior Level	
General Selling Skills	Strong verbal communications skills						
	Strong writing skills						
	Strong problem management skills						
	Strong analytic capabilities. Comfortable with data and analysis, understand analytic tools.						
	Able to lead cross functional and organizational teams, strong team building						
	Builds coalitions and support within customer and company.						
	Strong collaboration/partnering skills						
	Strong negotiation skills						
	Change management skills						
	Socratic questioning						
	Rapport building						
	Handling objections						
	Qualifying/Disqualifying						
	Closing, trial closing						
	Presenting proposals and quotes						
	Storytelling						
	Cold calling, prospecting						
	Conducts effective, high impact sales calls, whether in person or on the phone						
Social selling, using social networking for prospecting, research, networking, qualifying, sales process management							

	Effective networking both in “real” and “virtual” communities.						
	Scheduling appointments						
	Effectively demonstrating product capabilities and connecting to specific customer value						
	Effective call planning/execution						
	Conducting business reviews						
	Clearly present solutions in a value based context						
	Strong project management skills						
	Ability to sell competitively						
	Ability to use technology and tools to improve personal productivity						
	Ability to understand and present business value						
	Ability to minimize discounting						
	Customer buying cycle understanding and management						
	Understanding customer buying process						
	Understanding and leveraging "political" structure within the organization						